crestone.

GETTING STARTED WITH CLIENT CONNECT

ACCESS YOUR FINANCIAL INFORMATION ANYTIME, ANYWHERE

Welcome to Client Connect, our new online portal which gives you convenient access to your transaction confirmations, corporate action notices, portfolio statements and reports. The portal adopts a stringent approach to security, so you can rest assured that your personal information only remains accessible to you.

Client Connect will be enhanced regularly, and we hope it will become a valuable tool to help you manage your financial affairs. We will keep you informed as these enhancements become available.

GETTING STARTED WITH CLIENT CONNECT

How to send and receive messages

You can send messages to the Client Connect help desk by selecting the *New message* button in the *Messages* tab. Read messages from the Client Connect help desk by selecting *Inbox* from the drop-down menu. You can also store messages in a way that's convenient for you by creating new folders from this menu.

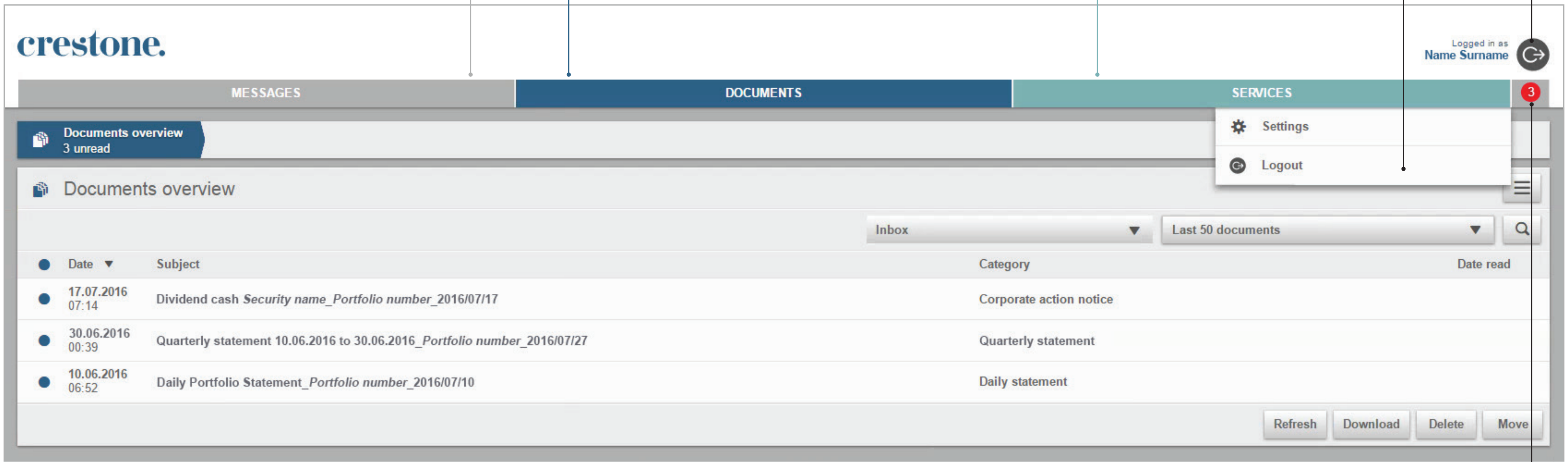
How to view your latest portfolio statements and reports

You can view your transaction confirmations, corporate action notices portfolio statements and reports in the *Documents* tab, by selecting *Inbox* from the drop-down menu. You can also store these documents in a way that's convenient for you by creating new folders from this menu.

How to change your password

Keep your information secure, and change your password online at any time by selecting *Settings* from the *Services* drop-down menu. If you have forgotten your password, and need to have this reset, please contact your investment adviser.

Logout buttons



Notifications for messages and documents